

**3.3.11 Energy Service Company (ESCO) Industry Activity (\$Million Nominal) (1)**

	Estimated Revenue (\$Million Nominal) (1)		<u>2008 Revenue Sources</u>	
	<u>Low</u>	<u>High</u>	<u>Market Segment</u>	<u>Share</u>
1990	143	342	MUSH (2)	69%
1991	218	425	Federal	15%
1992	331	544	Commercial & Industrial	7%
1993	505	703	Residential	6%
1994	722	890	Public Housing	3%
1995	1,105	1,159		
1996	1,294	1,396		
1997	1,394	1,506		
1998	1,551	1,667		
1999	1,764	1,925		
2000	1,876	2,186		
2001	-	-		
2002	-	-		
2003	-	-		
2004	2,447	2,507		
2005	2,949	3,004		
2006	3,579	3,627		
2007	-	-		
2008	4,087	4,171		

2008 Revenues by Project/Technology Type

<u>Market Segment</u>	<u>Share</u>
Energy Efficiency	75%
Onsite Renewables	14%
Engine/Turbine Generators	6%
Consulting/Master Planning	3%
Other	2%

Note(s): 1) Estimates based on surveys of major ESCOs and input from industry experts. 2) Includes municipal and state governments, universities and colleges, K-12 schools, and hospitals.

Source(s): LBNL, Market Trends in the U.S. ESCO Industry: Results from the NAESCO Database Project, LBNL-49601, May 2002 for 1990-2000; LBNL, A Survey of the U.S. ESCO Industry: Market Growth and Development from 2000 to 2006, LBNL-62679, May 2007 for 2004-2006; and LBNL, A Survey of the U.S. ESCO Industry: Market Growth and Development from 2008 to 2011, LBNL-3479E, June 2010 for 2008.